PROPOSAL EVALUATION WORKSHEET (CONSENSUS)

EVALUATION FACTOR: CUSTOMER SERVICE PLAN (RATED)

PROPOSER: Keolis

DATE: August 27, 2013

CONSENSUS RATING: Good

NARRATIVE SUMMARY: Keolis understands need for data and organizational alignment to ensure the highest levels of customer service are met and maintained. This proposal demonstrates a comprehensive appreciation for market research of not only current customers but equally as important - the non-customers. Keolis' proposal demonstrated well their mantra – "think like a passenger". At every customer touch point (pre-trip, trip and post trip) they are communicating with customers and assessing their feedback. This in turn, is utilized by senior management and incorporated into performance metrics and appraisals. Structurally customer service is integrated within the three functional departments (transportation, mechanical and engineering).

Objective:

The following are the objectives for the Customer Service Plan evaluation factor:

1) To ensure that Proposers demonstrate the ability to maximize customer satisfaction measured by MBTA-approved metrics;

2) To identify Proposers that will continuously improve messaging regarding customer and public safety; and

3) To identify Proposers committed to implementing innovation in the provision of all regular and special service information.

Evaluation Criteria:

The Proposer has demonstrated the ability to maximize customer satisfaction measured by MBTA-approved metrics. The Proposer has shown that it will continuously improve messaging regarding customer and public safety and that it is committed to innovation in the provision of all regular and special service information.

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Instructions:

Evaluators must rate each requirement outlined in the table below as one of the following: (i) Exceptional; (ii) Good; (iii) Acceptable; (iv) Potential to Become Acceptable; or (v) Unacceptable. Please note the following explanations when rating each requirement:

1) A rating of Exceptional is appropriate when the Proposer has demonstrated an approach that is considered to significantly exceed stated criteria in a way that is beneficial to the MBTA. This rating indicates a consistently outstanding level of quality, with very little or no risk that this Proposer would fail to meet the requirements of the solicitation. There are no weaknesses.

2) A rating of Good is appropriate when the Proposer has demonstrated an approach that is considered to exceed stated criteria. This rating indicates a generally better than acceptable quality, with little risk that this Proposer would fail to meet the requirements of the solicitation. Weaknesses, if any, are very minor. Correction of the weaknesses would not be necessary before the Proposal would be considered further.

3) A rating of Acceptable is appropriate if the Proposer has demonstrated an approach that is considered to meet the stated criteria. This rating indicates an acceptable level of quality. The Proposal demonstrates a reasonable probability of success. Weaknesses exist but can be readily corrected through requests for Clarification or Communications.

4) A rating of Potential to Become Acceptable is appropriate if the Proposer has demonstrated an approach that fails to meet stated criteria as there are weaknesses, but they are susceptible to correction through Discussions. The response is considered marginal in terms of the basic content and/or amount of information provided for evaluation, but overall the Proposer is capable of providing an acceptable or better Proposal.

5) A rating of Unacceptable is appropriate if the Proposer has demonstrated an approach that indicates significant weaknesses and/or unacceptable quality. The Proposal fails to meet the stated criteria and/or lacks essential information and is conflicting and/or unproductive. There is no reasonable likelihood of success; weaknesses are so major and/or extensive that a major revision to the Proposal would be necessary.

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Ratings for each requirement must be recorded in the associated Rating column, and a detailed explanation of why a particular rating was given to a requirement must be recorded in the associated Comments/Justification for Rating column. The Appendix B Section column identifies relevant sections of Appendix B (Operations and Management Proposal Instructions) to the Instructions to Proposers.

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Requirement No.	Appendix B Section	Requirement	Rating	Comments/Justification for Rating
1.	B8.2(A)	The Proposer shall provide a Customer Service Plan that describes in detail the Proposer's approach to providing the customer service functions described in the Contract, including the customer service services described in Schedule 3.7 (Operator Customer Service Responsibilities) of the Commuter Rail Operating Agreement. Elements of the Customer Service Plan shall include, but not be limited to, proposed approaches to the following: 1. Providing prompt and accurate public information regarding schedules, routes, delays and other service disruptions, and all other aspects of Commuter Rail Services about which customers should be informed; 2. Lost and found services; 3. Planning for, and handling of, service related to special events; 4. Responding promptly and effectively to customer complaints and suggestions for service improvements; 5. Service monitoring;	**Good**	**Keolis' baseline market research is the underpinning of a robust CSIP plan. Their strategic organizational structure promotes metrics and accountable with regard to customer service in a unique way. Specifically, customer service is elevated via the newly created Performance Manager position, analysts, and quality assurance role which is now on par with transportation.** **Keolis's plan uses some existing modes of communication/tactics yet offers some "new ways" of doing the same thing. This approach will change the face of customer service.** • **Creating a Customer Charter (in lieu of customer bill of rights)** • **Adopting new "i cloud" based technology to enhance customer service feedback systems.** • **Aligning responsibility to accountability** • **Conduct once a week customer service station audits. Thereby executing their "think like a passenger" perspective.** • **Acknowledging/understanding need for diversity/ADA initiatives for customers and employees.** • **Conducting post disruption customer surveys.** • **Operations service center hours to mirror MBTA operations.** • **Lost and Found service plan meets requirements**

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Requirement No.	Appendix B Section	Requirement	Rating	Comments/Justification for Rating
		6. Performance analysis and reporting; 7. Integrating new technologies and work practices as introduced by the Operator or the MBTA; 8. Provide information management, material management, performance analysis and reporting; 9. All other aspects of communication with customers; and 10. A draft Customer Service Satisfaction Plan as further described in Section 2.13 (Customer Service Satisfaction Efforts) of Schedule 3.7 (Operator Customer Service Responsibilities) to the Operating Agreement.		• **Enhanced train cleaning initiatives** **Well thought out strategy and organizational structure is reflected throughout this plan- supportive of customer service excellence.**
2.	B8.2(B)	The Proposer shall: (i) identify those portions of the information that it provided in response to Section B8.2(A)(1) – (10) of Appendix B that it considers to be innovative, best practice, beneficial to MBTA Customers and/or cost efficient, and (ii) submit information supporting or otherwise validating its position that said portions are innovative, best practice, beneficial to MBTA Customers and/or cost efficient.	**Good**	**Keolis' approach would put in place practices, policies, program and metrics that bolster customer service. This is demonstrated with their top down management structure and customer service performance alignment with transportation performance.** • **Customer service positions housed in transportation, mechanical, engineering.** • **Creating targeted programs for our specific CR demographics.**

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